

Prepare a Report: Number of Volunteers and Hours by Event for a Particular Time Period Using Template

Step 1: In Volunteer Builder:

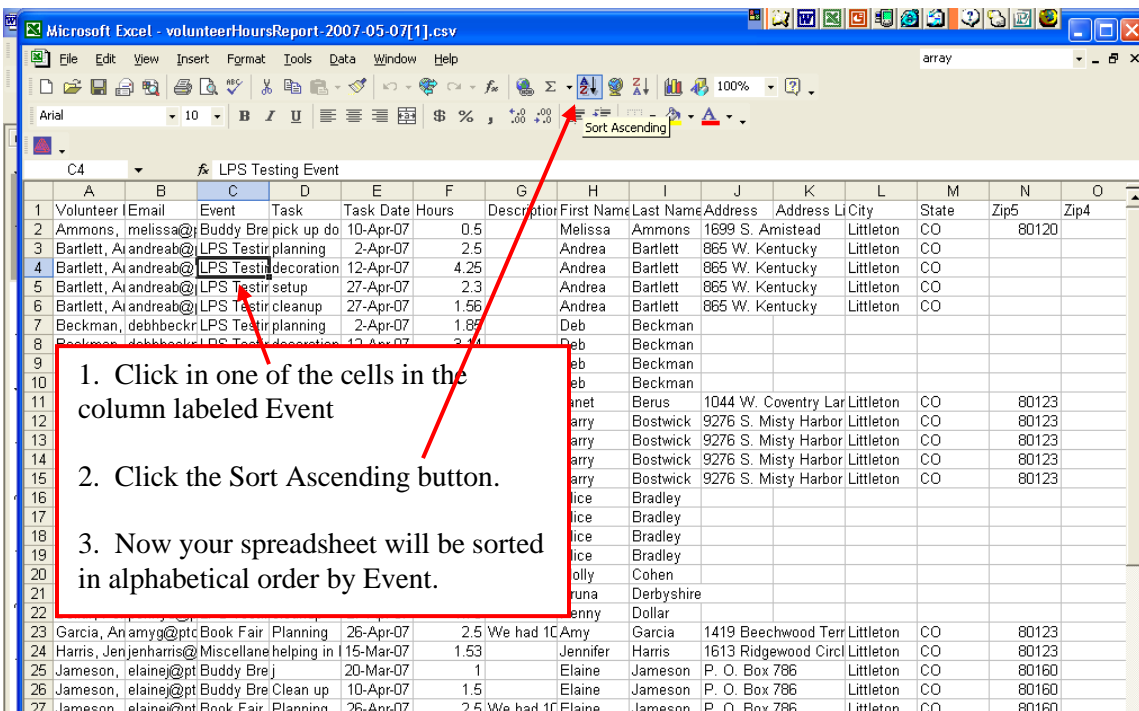
Select Reports, then Volunteer Detail. Fill in the Start and End Date for the current month. Select Search. Select "Save List to My Computer".

Step 2: Switch to Excel (where the List will have been saved when you selected "Save List to My Computer:)

You should now see an Excel spreadsheet with the Volunteer Detail report.

Also in Excel, open the Template spreadsheet (LPS Template.xls) now.

Step 3: sort your spreadsheet (not the Template) by Event.



1. Click in one of the cells in the column labeled Event

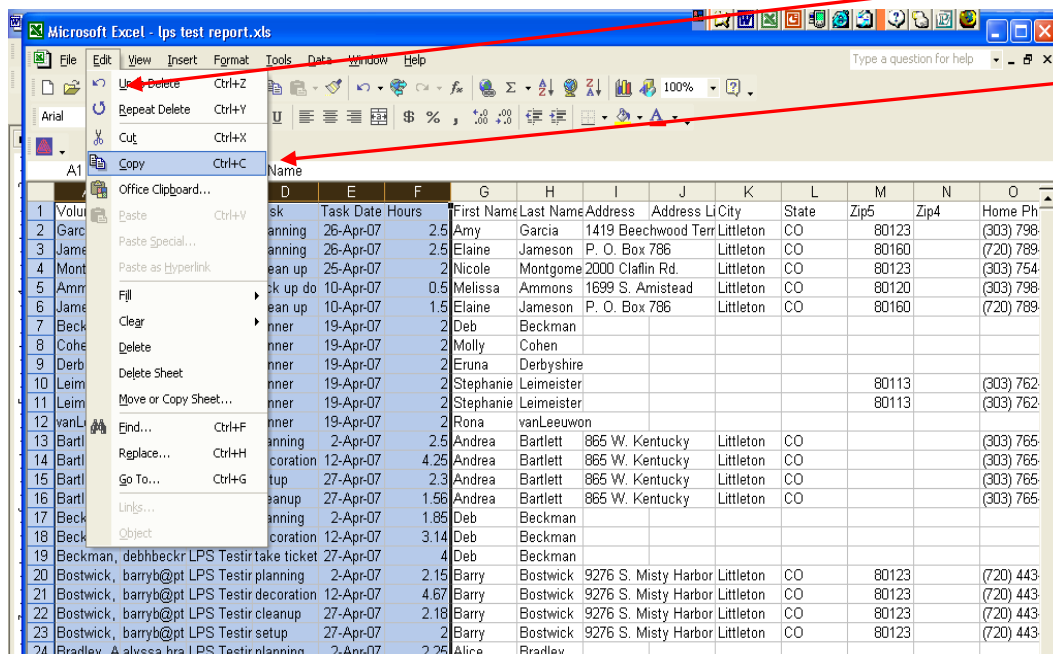
2. Click the Sort Ascending button.

3. Now your spreadsheet will be sorted in alphabetical order by Event.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
	Volunteer	Email	Event	Task	Task Date	Hours	Description	First Name	Last Name	Address	Address Li	City	State	Zip5	Zip4
1	Ammons, melissa@	Buddy Bre pick up do			10-Apr-07	0.5		Melissa	Ammons	1699 S. Amistead		Littleton	CO	80120	
2	Bartlett, A andrea@	LPS Testir planning			2-Apr-07	2.5		Andrea	Bartlett	865 W. Kentucky		Littleton	CO		
3	Bartlett, A andrea@	LPS Testir decoration			12-Apr-07	4.25		Andrea	Bartlett	865 W. Kentucky		Littleton	CO		
4	Bartlett, A andrea@	LPS Testir setup			27-Apr-07	2.3		Andrea	Bartlett	865 W. Kentucky		Littleton	CO		
5	Bartlett, A andrea@	LPS Testir cleanup			27-Apr-07	1.56		Andrea	Bartlett	865 W. Kentucky		Littleton	CO		
6	Beckman, debb@	LPS Testir planning			2-Apr-07	1.85		Deb	Beckman						
7	Beckman, debb@	LPS Testir planning			2-Apr-07	1.85		Deb	Beckman						
8	Beckman, debb@	LPS Testir planning			2-Apr-07	1.85		Deb	Beckman						
9								Deb	Beckman						
10								Deb	Beckman						
11								Deb	Beckman						
12								Deb	Beckman						
13								Deb	Beckman						
14								Deb	Beckman						
15								Deb	Beckman						
16								Deb	Beckman						
17								Deb	Beckman						
18								Deb	Beckman						
19								Deb	Beckman						
20								Deb	Beckman						
21								Deb	Beckman						
22								Deb	Beckman						
23	Garcia, An amy@	ptc Book Fair Planning			26-Apr-07	2.5	We had 1C	Amy	Garcia	1419 Beechwood Terr		Littleton	CO	80123	
24	Harris, Jenjen@	miscellaneous helping in			15-Mar-07	1.53		Jennifer	Harris	1613 Ridgewood Circl		Littleton	CO	80123	
25	Jameson, elainej@	pt Buddy Bre j			20-Mar-07	1		Elaine	Jameson	P. O. Box 786		Littleton	CO	80160	
26	Jameson, elainej@	pt Buddy Bre Clean up			10-Apr-07	1.5		Elaine	Jameson	P. O. Box 786		Littleton	CO	80160	
27	Jameson, elainej@	pt Book Fair Planning			26-Apr-07	2.5	We had 1C	Elaine	Jameson	P. O. Box 786		Littleton	CO	80160	

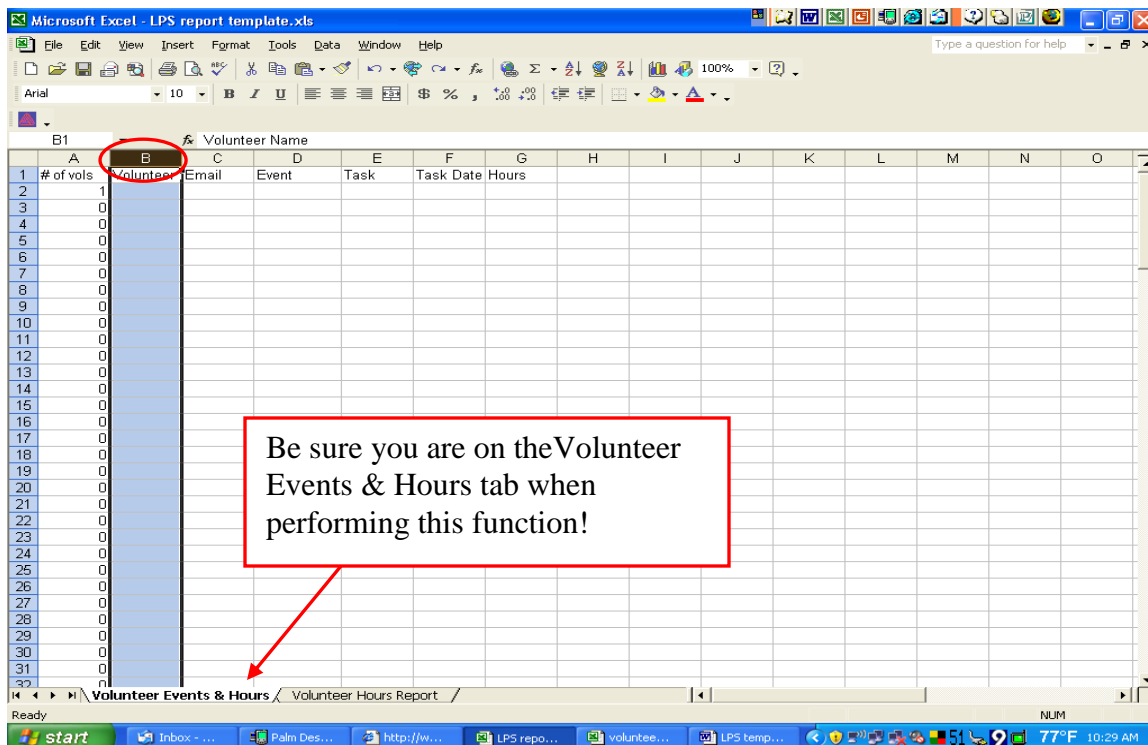
Step 4: Copy the spreadsheet to the Template

Select columns A through F by highlighting those column headings. Select **Edit** from the top menu.



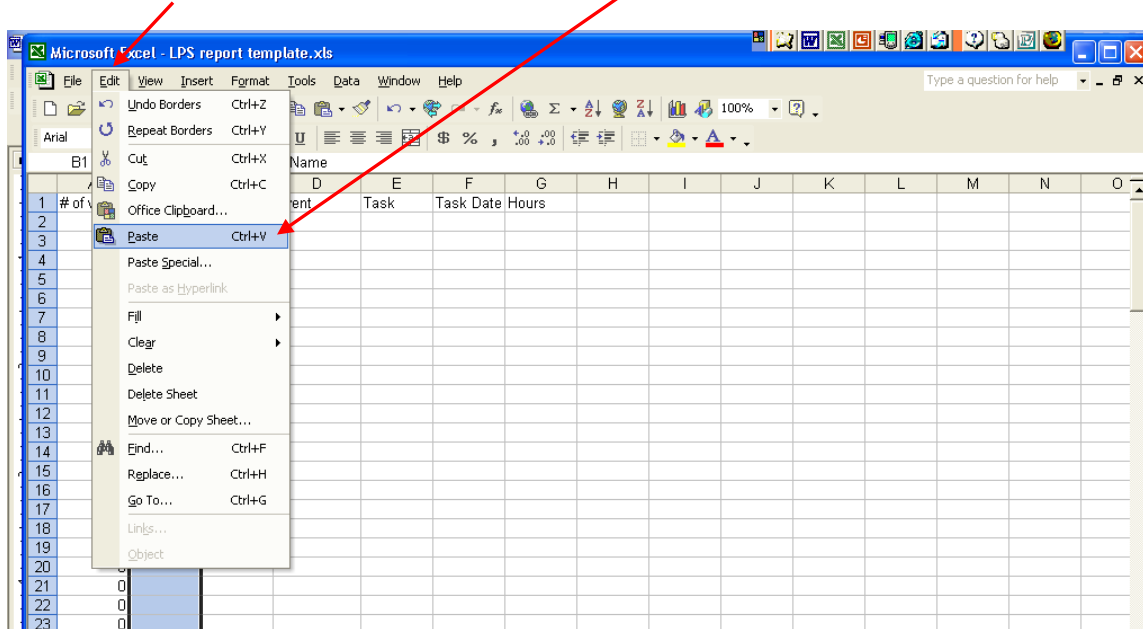
Next, select
Copy.

Next, switch to the Template. On the template, click in (select) **column heading B**, which will then highlight that column.

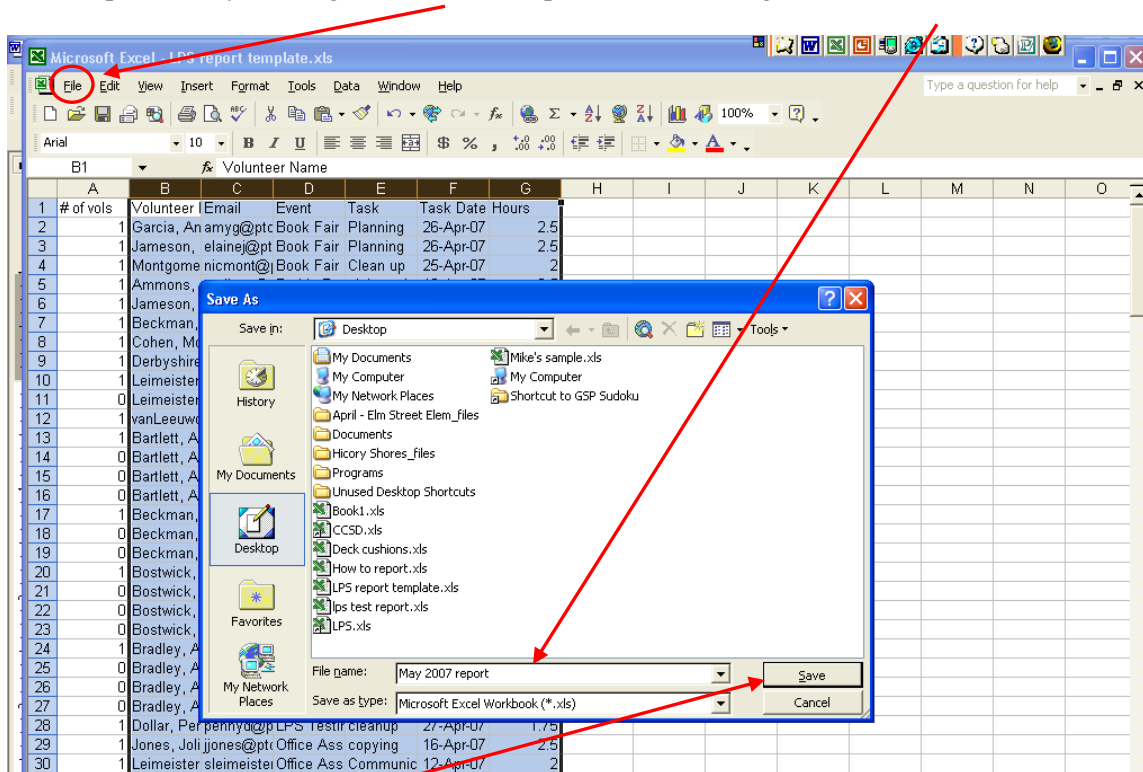


Be sure you are on the Volunteer
Events & Hours tab when
performing this function!

Now select **Edit** from the top menu, then select **Paste**.



The Template will now have your own monthly information in it. Save it with a new name (e.g., May 2007 Report.xls) by clicking on **File** on the top menu, then filling in **your new file name**.



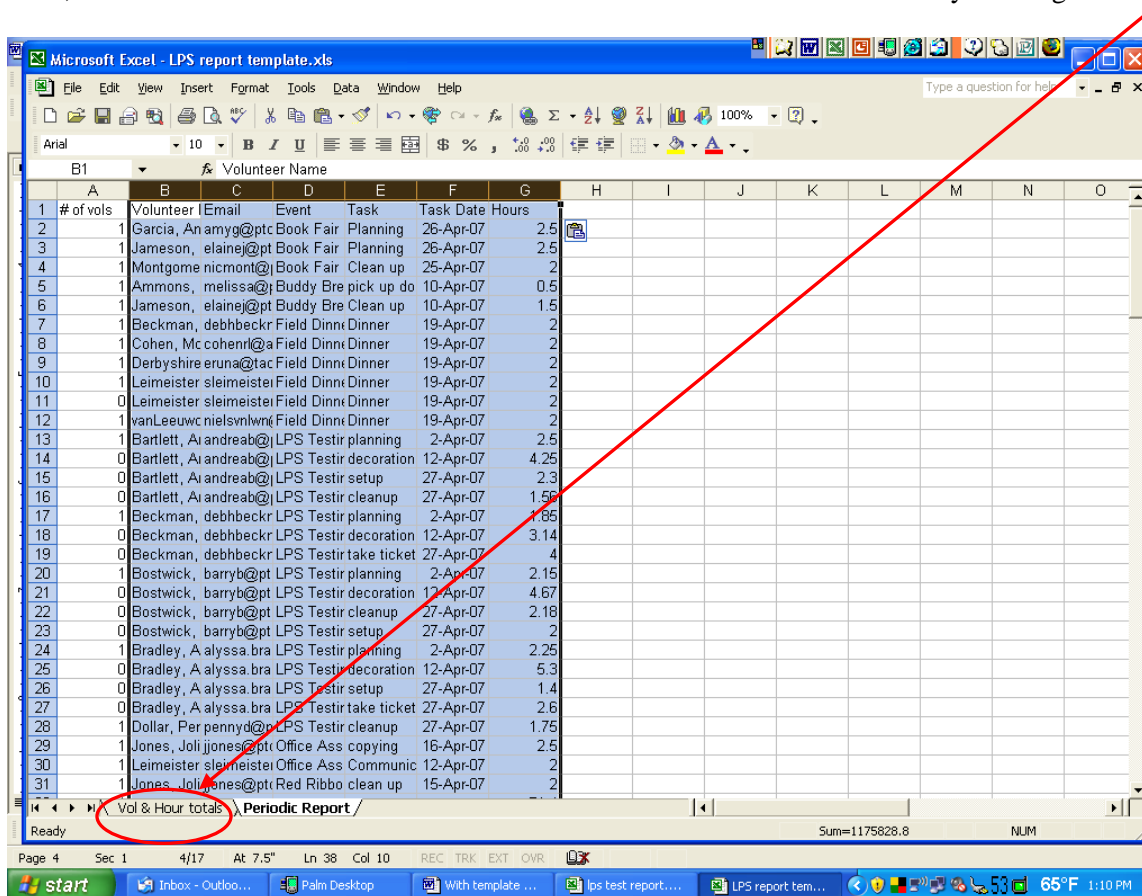
Don't forget to click **Save**.

Step 5: Make sure column A has a value in it for each row in the spreadsheet

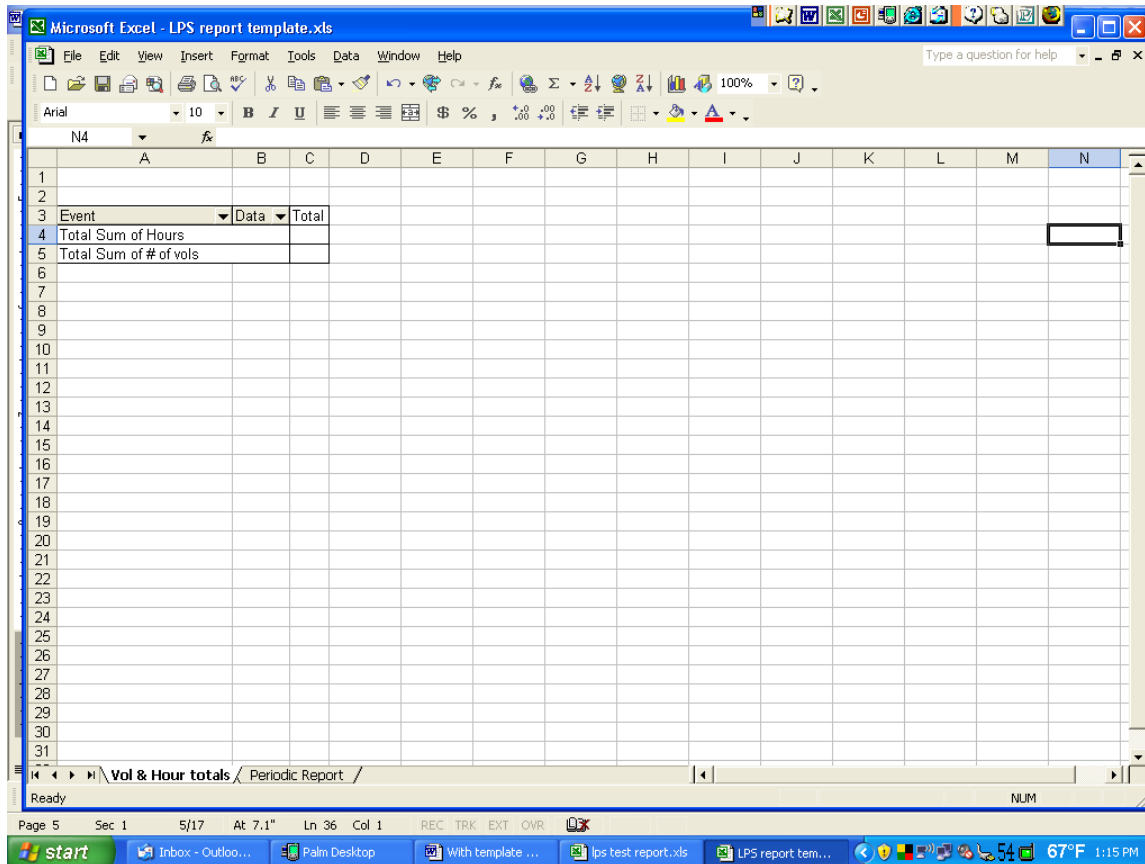
Column A uses a formula to count the number of unique volunteers in each Event. The Template includes a calculation for up to 150 rows of data (that is, 150 Volunteer + Event combinations). If the Template doesn't have enough rows to match the number of rows you have copied into it, you will need to copy from one of the cells in Column A that is filled in, to the unfilled rows. You can do that by clicking in one of the filled-in Column A cells, selecting **Edit** from the top menu, then **Copy**. Then highlight the cell(s) that you want to copy the formula to and select **Edit**, then **Paste**.

Step 6: Update the Hours and Totals worksheet

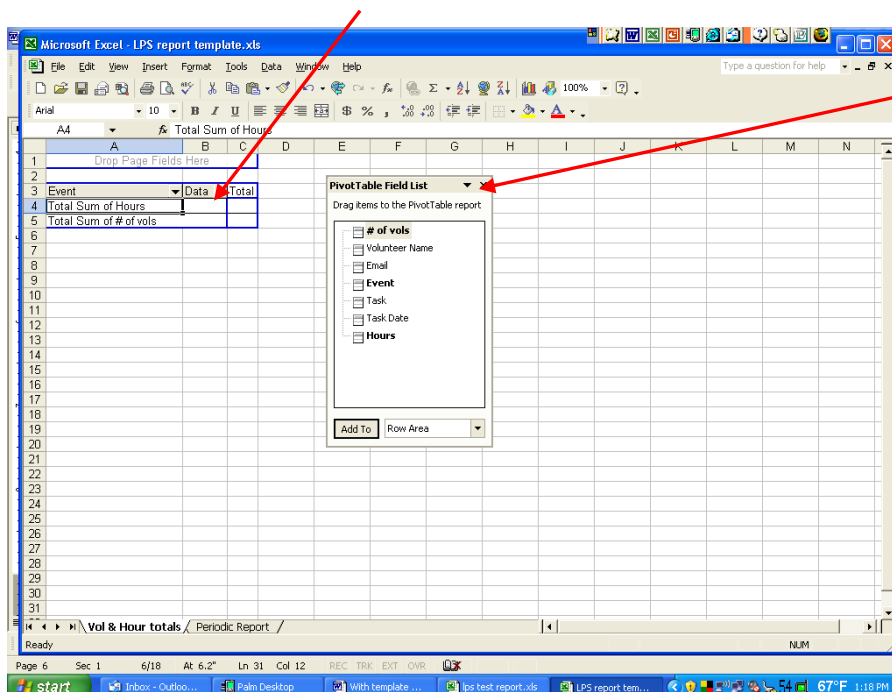
Now, switch to the **Vol & Hours totals worksheet** at the bottom of the screen by clicking on the tab:



You will see a worksheet that looks like this:

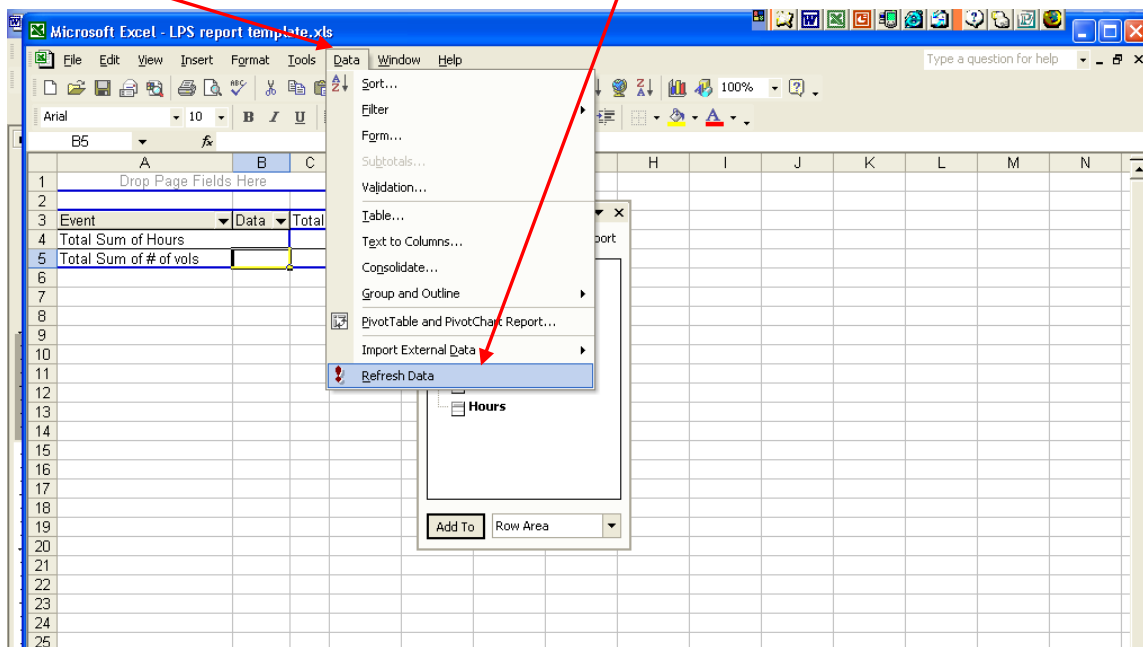


Click in one of the cells in the small table.

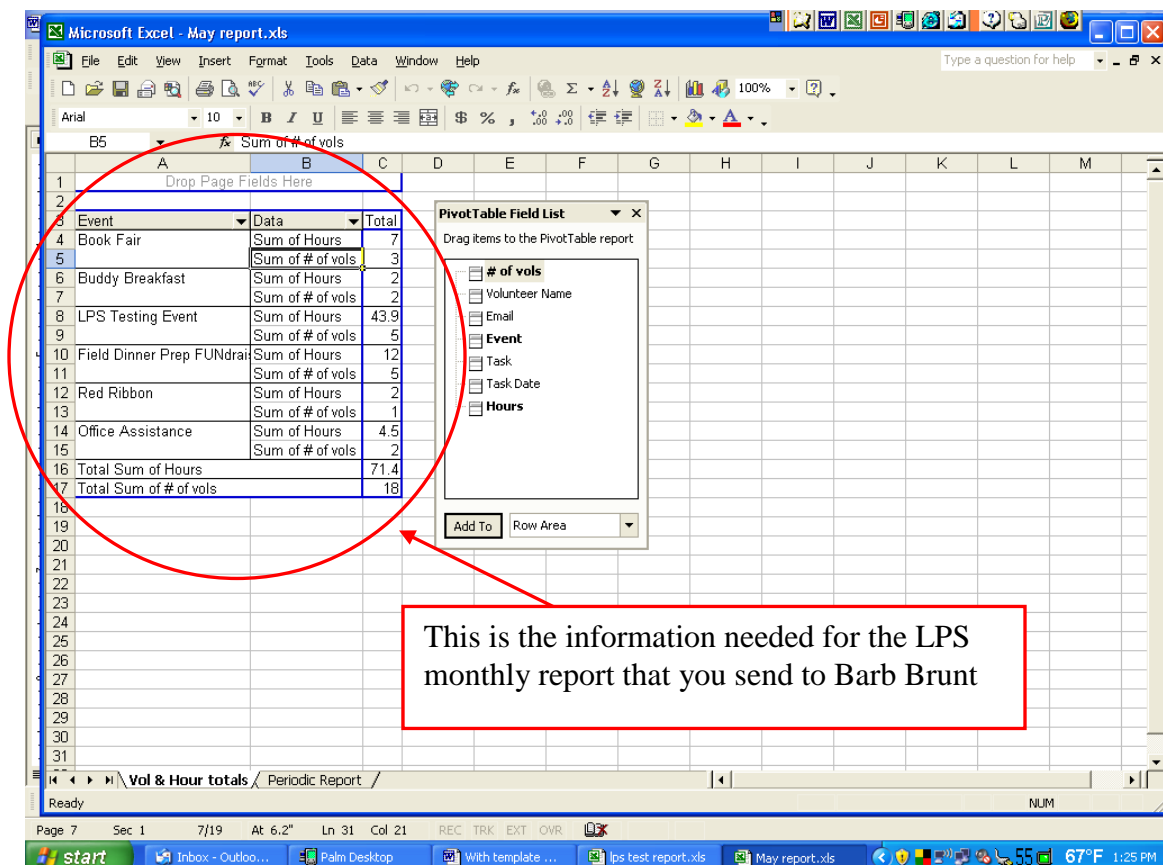


When you do that, you will see a table labeled "Pivot Table Field list".

Select **Data** from the top menu, then click on **Refresh Data**.



Your spreadsheet will then be updated with the data you copied onto the previous worksheet. It will look similar to the illustration below. **Be sure to click File/Save to keep your updated monthly report!**



Help Resources From PTO Today are:

email support:

support@ptomanager.com

online chat: available under
the Help function within the
software

800#: 800-557-2670

Jolinda Jones, PTO Today

jjones@ptotoday.com

303.798.2043 or 866.656.8071

